

QuickDOC For Windows

Latest Update Info (MLA '03):

(Last Revised: 5/27/2003)

QDPortal Program

The latest QDPortal Version is 1.0.8, and was posted on March 8, 2003; it is meant to work with the latest DOCLINE version 1.5.1.

QDPortal Installation. See: <http://nnlm.gov/quickdoc/InstallQDP.html>

QuickDOC Program

The latest QuickDOC Version is 2.1.1, and was posted on Feb 18, 2003; this update included many changes, described in the 36-page document at: <http://nnlm.gov/quickdoc/QDNew211.pdf>

QuickDOC Installation. See: <http://nnlm.gov/quickdoc/InstallQD.html>

Planned for next QuickDOC Release (2.1.2)

1. The first steps toward **Integrating QDPortal and QuickDOC** will be included (e.g., moving more values from the Windows Registry to the QuickDOC.MDB database, so that all values not specific to a particular machine can be shared by all users). It is anticipated that full integration will occur in the update after this next (2.1.2) update.
2. New **Local Preferences** form to allow greater flexibility in the QuickDOC variables used in local situations. To this end, there will be a new form in 2.1.1, the Local Preferences form, with four Tabs, for **General** information, **Addresses**, **Patron Defaults** and **Billing**, **Local** and **Library**. This form replaces the old Billing Setup form, whose information is now located on the Billing, Local and Library Tab.

The **General Tab** of the Local Preferences form includes various DOCLINE, EFTS and other local choices, and will appear as follows:

Local Preferences

General **Addresses** **Patron Defaults** **Billing, Local and Library**

Beth Israel Deaconess Medical Center

MAUBET
Month Day

☐ **Send Patron Number only on DOCLINE**

Start Date to begin counts: Jan 1

☐ **Suppress Auto-Close of DOCLINE Popup Windows on this machine.**

Non-DOCLINE Request Information

Default Source when adding non-DOCLINE Requests: OCLC

☐ **Suppress use of standard non-DOCLINE Prefixes (OC, RL, MA, etc.)**

EFTS Upload Information

EFTS Username: u02215a EFTS IP Addr: 155.37.9.88

EFTS Password: EFTS Email: efts@uchc.edu

☒ **Send EFTS Upload Files by Email**

Check This Box to suppress the automatic prefixing of Non-DOCLINE items (OC for OCLC, RL for RLIN, etc.) when adding items in Lend or Borrow (Use this checkbox if you want to make up your own prefixes, but use of COPY for Copy Service is recommended for all).

OK Apply Cancel

Send Patron Number only on DOCLINE. Matches the current use in QDPortal but will keep the information in the database rather than as a Registry entry.

Suppress Auto-close of DOCLINE Popup Windows. This will continue to be a Registry entry, since it is machine-specific, but is moved here in anticipation of the integration of QuickDOC and QDPortal.

Default Source when adding non-DOCLINE Requests. This will be the default in the Source box on both the Add Borrow and Add Lend forms (the current default is DOCLINE, which remains available as a choice if needed).

Suppress use of standard non-DOCLINE Prefixes. 2.1.2 will automatically prefix non-DOCLINE added items with letters to indicate the source (e.g., OC = OCLC, RL = RLIN, COPY = Copy Service, etc.). This is to ensure that no made-up Request Number is in danger of duplicating a real DOCLINE number. If there is already a plan in place locally to do this, you can check the box to use your own prefixes rather than the built-in versions.

EFTS Username. Your ID in the EFTS system.

EFTS Password. Your Password in the EFTS system.

EFTS IP Address. The IP Address of the EFTS system, for use in ftp transfers.

EFTS Email. The Email Address of the EFTS system, for use in transfers using email attachments (this will probably be the default transfer method in the future).

Send EFTS Upload Files by Email. Check this box to specify email transfers. This is to prepare for some more automated sending procedure in the future.

The **Addresses Tab** of the Local Preferences form adds the ability to set different return address values for Library and Local Billing, and will appear as follows:

The screenshot shows the 'Local Preferences' dialog box with the 'Addresses' tab selected. The dialog has four tabs: 'General', 'Addresses', 'Patron Defaults', and 'Billing, Local and Library'. The 'Addresses' tab is active, showing two columns: 'Remit To Address: Library Billing' and 'Local Billing'. Both columns contain the same information: Institution Name (Beth Israel Deaconess Medical Ce), Department (Agoos Medical Library), Address (330 Brookline Ave.), City (Boston), State/Prov (MA), Country (USA), Postal Code (02215), Telephone (617.667-4225), Fax (617.667-7197), and Email (asilver@caregroup.harvard.edu). At the bottom, there is a yellow box with the text 'Enter the Institution Name to print on the Library Invoice. Press <F5> to Clear this Field.' and three buttons: 'OK', 'Apply', and 'Cancel'.

In most cases these will be the same, but the option is there to change them if they are not.

The **Patron Defaults Tab** of the Local Preferences form adds the ability to specify which fields of the Patron Record you want to send to DOCLINE (in the 40 spaces of

the DOCLINE Patron field that are available) and in what order you want to send them. It will appear as follows:

The screenshot shows a window titled "Local Preferences" with a tab labeled "Billing, Local and Library". Inside the window, there is a section titled "Send the following Patron Fields to the DOCLINE Patron Field, and in the following order:". Below this title are four input fields labeled "First Field:", "Second Field:", "Third Field:", and "Fourth Field:". The "First Field:" contains the text "Dept", and the "Second Field:" contains "Telephone". To the right of these fields is a yellow box titled "Patron Fields Available" which lists "CostCtr", "Email", "MailStop", and "AreaCode". At the bottom of the window, there is a yellow box with the following text: "Enter Patron Field #1 to be included on the 40-character Patron Line on DOCLINE. (Choices are listed in the box at right, above. Copy and Paste from the box, or enter value matching that in Patron Fields Available.) The 1st 14 characters of Lastname, Firstname will always". To the right of this text are three buttons: "OK", "Apply", and "Cancel".

Cut and paste the values from the yellow box into any of the four fields available.

The **Billing, Local and Library Tab** of the Local Preferences form adds the ability to set different values for various items relating to Library and Local Invoices, and will appear as follows:

Default Payment Method. Can be different for Library and Local.

Cost Center on Invoices. Can be different for Library and Local.

Fed ID No. on Invoices. Can be different for Library and Local (this value can be used for messages other than the ID number).

Make Check Payable To. Can be different for Library and Local.

Payment Terms. Can be different for Library and Local.

Print HTML copies. This controls whether or not HTML versions of Invoices are generated when a printed copy is made. Check **Never** if you never send these HTML Invoice; check **Ask** if you want to see a popup message box each time; and check **Always** if you want to have an HTML Invoice automatically generated without asking permission.

Suppress Invoice Box on Printed Invoices. This comes over from the old Billing Setup form and should be checked if your printer doesn't print a return address on Invoices but leaves a blank box instead.

Add'l Comment entry on Invoices. Room to add a brief comment that will print at the bottom of the invoice.

Move Invoice Address Up (1, 2 lines). If your Invoice Address doesn't quite fit the window of your window envelopes, then use this small adjustment to bring the address lines up. Two lines is the maximum move, alas.

Items brought up at the 5/6/2003 Users Group Meeting

1. **Is there any way to indicate, in Requests Outstanding, that there's a note on that item (the Notes field is usually off the screen to the right).** This was from a library that adds a note on special handling for items that require it. I'll try to see if there's a way (either another color, other than the current red used to indicate Journal Titles borrowed more than 5 times this year, or maybe some special graphic on the record selector button for that row) to indicate the presence of a note for that item. Since all Loansome Docs have a Note (indicating item owned and refer to DOCLINE values for that item), this format will be ignored in LD requests.
2. **Any way to flag a newly-imported item in Requests Outstanding to show that the Patron has a "Free" local charge profile.** (I may have this wrong---my notes just say 'Flag for Free?'---so whoever brought this up may want to email me a clarification.) Patron/Dept charges aren't computed until check-in, so there isn't currently a lookup done at the time of importing, but it could certainly be added. My concerns are twofold: 1. It would mean yet another color or graphic to complicate the display; and, 2. Wouldn't a Max Cost of Free prevent this conflict from occurring? (I seem to recall that the person suggesting this wanted to use the flag as a heads-up, so that a quick phone call could be made to see if the Patron wanted to support the extra charge, but I could be wrong; if so, please let me know. And any other supporters out there are also encouraged to let me know what I might have missed here. Sorry.)
3. **Automatic capitalization in QD.** There are some spots in QD data input where the program attempts to allow users to input information entirely in lower case and have the program provide caps at the appropriate places (beginning of words, usually). This sometimes results in more work than if the input were left alone (as in places like Mail Stop or Journal Title, where more than the first letter may be capitalized). I'll try to fix these ASAP, while retaining those that work (the Add Borrow and Add Lend forms can generally be entered entirely in lower case with good results: e.g., Author cummings ee will be re-formatted as Cummings EE, which is correct for a Medline entry if not for a poet).

4. **Fix case where a long Cost Center can't be seen in full in the Add Borrow Form.** This will be fixed in 2.1.2. A Tool Tip will be added to that box; it will show the complete Cost Center when the cursor is moved over it.
5. **Other Billing items: Statements and Second Notices.** These are definitely high on the to-do list. Probably not in 2.1.2 but soon thereafter.
6. **Email notification and background PubMed, Journals Lookup.** We also discussed these briefly. Some preparation for automatic email notification of Patrons will be in 2.1.2, but probably not the actual capability. That, and the background lookups, will be ready in the update that merges QDPortal (in the fall of this year).

After this 2.1.2 Update ...

The next step will be to bring together the QDPortal & QuickDOC Programs into one entity (the goal for that is this fall), which will permit a number of new enhancements, for example.

7. **Direct Access to the QuickDOC.MDB Database while running QDPortal.** The current situation is the result of the need to get the basic data-saving device online in time for the July 17, 2000 introduction of new DOCLINE. It's always been viewed as a temporary situation. The temporary Save files will disappear and items saved on DOCLINE will go right to the database. On the input side, beyond just the separate Patrons List from which you can choose a Patron online, all the tables in the database will be available (e.g., you can do a quick search on a PubMed UI to see who might have provided it before; we can generate Patron emails while in DOCLINE, etc., etc.). This will make everything seem much more seamless than the current setup.
8. **ISO ILL Compatibility.** Once the two programs are working as one, the next step will be to work on compliance with the ISO ILL Protocol. This will be of use to libraries with a large number of OCLC transactions, but most DOCLINE Libraries will probably continue to use the current interface, with the occasional OCLC transaction passed through and tracked in QuickDOC under its DOCLINE Request Number. Sometime in early 2004 for this, probably.

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